CAMPAIGN CHECKLIST AND STEPS FOR SUCCESS

Doing Good, Done Better

Welcome to the "Get on the Map" data-sharing campaign! By taking these first steps, you've become part of an exciting initiative that promises to dramatically improve the quality and availability of giving data for our region. Thanks for joining!

This checklist outlines the necessary steps for successfully and seamlessly launching the campaign in your region. The checklist is organized into each major phase of the campaign implementation:

1. Getting Ready
2. Data Collection Launch
3. Initial Data Collection Period
4. Synthesis and Mapping
5. Map Launch

The "Get on the Map" toolkit is available for download at www.foundationcenter.org/ereporting/gotm/. It includes all of the messaging and collateral needed to implement the campaign.

If you have questions, contact:

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FOUNDATION CENTER
by Candid.

1. GETTING READY

- ☐ Send the following to Foundation Center:
  - ☐ Signed Foundation Center/Forum Partnership agreement
  - ☐ Most current member list with EIN numbers
  - ☐ Name of regional association point person for the campaign

- ☐ Foundation Center will return the member list, noting current eReporters, and who is part of the FC1000 research set.

- ☐ Regional association staff (with support from Foundation Center):
  - ☐ Identify a core team of Peer Ambassadors for the campaign.
    - ☐ Schedule a meeting with the Peer Ambassadors to explain, in detail, the campaign and describe their roles as ambassadors.
    - ☐ Ensure ambassadors are all eReporting and know the basics of how eReporting works.
    - ☐ Provide ambassadors with talking points.
  - ☐ Set key success targets for the campaign—both the target number of participating foundations along with specific foundations that are leaders in the community.
  - ☐ Review program and events calendar for opportunities to overlay messaging into existing programming throughout the data collection period:
    - ☐ Schedule webinars
    - ☐ Schedule calls from the podium by Peer Ambassadors at every public event
    - ☐ Schedule news e-blasts
    - ☐ Schedule tweets/integrate into social media strategy

- ☐ Load materials on the regional association website and feature "Get on the Map" campaign on the homepage and assign a dedicated, easy-to-find location for the rest of the campaign details.

- ☐ Schedule launch and set deadlines for initial data collection period.

2. DATA COLLECTION LAUNCH

- [ ] Schedule the launch during an event where most of the membership is in attendance in order to build collective momentum (an annual meeting is ideal, but any large-scale meeting can work).

- [ ] Have senior leadership announce the campaign and explain the "why," how it works, and what it will mean for the region.

- [ ] Ask members to sign commitment cards (provided in the toolkit) to get on the map and make a roster of those funders who have shown interest as way of targeting follow-up.

- [ ] Have Peer Ambassadors offer testimonials and agree to be identified as being available to answer questions. Ambassadors can wear buttons and hand out commitment cards.

- [ ] Announce a follow-up webinar with Foundation Center staff to drill deeper on the "how-to-report" piece, and to demonstrate an existing map.

- [ ] Immediately following launch event, send full membership a follow-up email announcing both the campaign (for those who missed the launch event) and the webinar where they can get more information on what is happening and how to participate.

3. INITIAL DATA COLLECTION PERIOD

- [ ] Promote the campaign to the membership at every event with calls from the podium throughout the data collection period.

- [ ] Mention the campaign in all e-communications. A campaign graphic that can be pasted into email signatures is provided in the toolkit.

- [ ] Foundation Center will provide regular updates to the regional association about who is joining. You are welcome to share a public scroll on your webpage if that fits with the culture of your region.

- [ ] One month in: Foundation Center and the regional association will check in and evaluate progress.
    - [ ] Set up an individual call list and divide it among staff and Peer Ambassadors.
    - [ ] Schedule any additional programming needed to reinforce the urgency of submitting data during the data collection period, so that the map will have the most impact.

4. SYNTHESIS AND MAPPING

- [ ] Foundation Center will publish grants data in 10-15 business days depending on quality of data and volume of submissions.

- [ ] Foundation Center will regularly provide the regional association with updated lists of the members now participating in the campaign.

- [ ] Foundation Center will deliver a preliminary “beta” map at the request of the regional association.

- [ ] Find times to give the Peer Ambassadors sneak peeks or regular early access to the map as it evolves.

5. MAP LAUNCH

- [ ] Schedule Map Launch at a big event where most of the membership is attending.

- [ ] Peer Ambassadors can launch the map and announce another follow-up webinar to walk through the map in detail.

- [ ] Immediately following the event, send a news blast to wider membership announcing both the map and scheduled webinar to demo the map.

- [ ] As part of the above news blast, include a call to submit data (so we can continually improve the map), as well as an explanation of the necessary steps to take to get on the map.

- [ ] Continue to include messaging in all communications in order to drive traffic to the map and encourage participation.

- [ ] Schedule an event within a couple months of map launch, inviting participating members to discuss how they are using it and asking them for feedback.